



## Go-to-Market Agility Powered by Operational Excellence

With the market in a state of constant change, Sales and Marketing leaders are rapidly reinventing both short- and long-term go-to-market strategies. This award recognizes one operations team and its standout ability to help an organization nimbly pivot to successfully meet new market realities.

### The Winner



#### The Challenge

In April 2021, SaaSOptics and Chargify were purchased by Battery Ventures to go after the mid market, B2B FinOps space. Bringing together two companies with distinctly different processes posed an interesting challenge as decisions needed to be made regarding processes, technologies used, and go-to-market strategies.

On the technology front, there were two Salesforce instances, two marketing automation platforms, two different marketing funnels, and a slew of other RevTech tools. One sales team was fully outbound, the other was fully inbound, yet both were competing for the same companies on deals. Not to mention, there were different go-to-market philosophies in play: product-led growth (PLG) versus sales-led growth (SLG).

To further complicate the situation, the platforms themselves were built on different programming languages. These two organizations needed to combine teams, unify the GTM strategy, and grow into one company, Maxio.

#### The Operational Approach

To implement such all-encompassing changes, Maxio began with the sales teams. Formerly inbound sales teams were trained in outbound motions with multiple tools to support. With no possibility of combining two Salesforce accounts, Maxio created a data flow and linked forms between the two using Zapier.

Next, selecting one primary Salesforce account, data processes were put into place over the course of six months. With a lot of trial and error using Dataloader, leads, activities, files, and accounts were imported into the new primary Salesforce account.

Maxio relied heavily on LeanData and Zapier to keep marketing funnels and lead distribution working as intended. With two strong brands, it didn't make sense to have one marketing funnel, so Maxio built processes that allowed them to route based on lead origination, teams, and funnel management.

With a website launch planned for September 2022, Maxio will be using LeanData to route three brands until they sunset Chargify and SaaSOptics. By combining tools, bringing in new tools, and training teams to use everything in their stack to their advantage, Maxio can now focus on what's most important: prospects and customers.

#### Operational Results

Maxio team members will fully admit that not every decision made during the transition was the right one, however their ability to pivot, reestablish processes, and grow showed grit and determination. Overall, the changes across all teams have brought measurable positive results:

##### Measurable benefits include:

- Service level agreement time has decreased from 1-2 days to 1 hour
- 2x increase in BDR closes from the BDR motion
- 40% increase in meeting show rate
- 35% increase in customer retention rates
- 10% increase in close rate
- 15% increase in inbound pipeline by automating inbound processes
- 35% increase on outbound pipeline by moving the Chargify BDR team to inbound plays to initiate

**“All these processes and changes were done by a fast moving agile RevOps team. We started as a small team and expanded across RevOps and Data roles. This team has been given the responsibility to be the catalyst for change and the reliable source of truth. And we are just that. We would not be able to move as fast as we have if it was not for the respect we have among the Executive Leadership, stakeholders, and company. The teams are now all combined and working together to bring the Maxio vision to reality and the results have been AMAZING.”**

– Trent Allen, RevOps Manager